Post 9/11 GI Bill Benefits

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POST 9/11 GI BILL

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Eligibility

Individuals with active duty service after 09/10/01 who:

- Serve a period of at least 90 aggregate days
- Serve a period of at least 30 days and receive a disability discharge

Eligibility

- Qualifying active duty includes:
  - Full-time duty in the Armed Forces, other than active duty for training
  - A call or order to active duty under Title 10

- Active duty periods may begin at any time, however only portions after 09/10/01 can be used to establish eligibility

- VEAP, ROTC, Academy Grads are eligible

Eligibility

Service which cannot be used to establish eligibility includes:

- AGR under title 32
- Service academy contract periods
- ROTC contract periods under Title 10
- Service under the Loan Repayment program

Eligibility

- Basic eligibility established with 90 aggregate days of service

- Benefit level based on length of service

- Maximum benefit payable if individual serves at least:

  - 36 months of active duty service

  - 30 days of active duty service with a disability discharge

Eligibility

POST 9/11 Era eligible only

- Effective 8/01/09

  - Serves 36 months* = 100% of benefits
  - At least 30 months, but less than 36 months* = 90%
  - At least 24 months, but less than 30 months* = 80%
  - At least 18 months, but less than 24 months* = 70%
  - At least 12 months, but less than 18 months* = 60%
  - At least 6 months, but less than 12 months* = 50%
  - At least 90 days, but less than 6 months* = 40%

  *Aggregate of months served after Sept 10, 2001

Elections

The Post 9/11 GI Bill benefits may be elected in place of the following benefits:

- Montgomery GI Bill – Active Duty (MGIB-AD or Chapter 30)
- Montgomery GI Bill – Selected Reserve (MGIB-SR or Chapter 1606)
- Reserve Educational Assistance Program (REAP or Chapter 1607)

This election is <u>irrevocable</u>

Elections

- An individual who relinquishes eligibility under MGIB-AD, MGIB-SR, or REAP may receive benefits for approved programs not offered by degree-granting institutions (i.e. flight, correspondence, Apprenticeship/On-the-Job Training, preparatory course, and national test)

- Individuals will be paid as if they are still receiving benefits under the relinquished benefit, however, their entitlement will be charged under the Post 9/11 GI Bill

- The monthly housing allowance, books and supplies stipend are not payable

Elections

- Elections must include:
  - The effective date of the election (must be on or after August 1, 2009)
  - The benefit the individual is relinquishing to receive Post 9/11 GI Bill
  - Acknowledgement that the election is irrevocable

- Individuals will elect on the revised VA Form 22-1990, Application for VA Education Benefits (available on the GI Bill website: www.gibill.va.gov)

- Election should be made when member is ready to begin an educational program (up to 10 years from transition date)

Elections

Montgomery GI Bill – Active Duty Chapter 30

- $1200 Contribution
- 36 Months of entitlement (current value: $47,556)
- $600 Buy-Up option adds $5,400
- Benefit expires 10 years after separation from A/D
- Full-time student benefit = $1,321 per month
- Reimbursement program for Active duty

Entitlement

Generally, entitlement provisions under the Post 9/11 GI Bill are similar to those under other education benefit programs:

- Individuals may receive 36 months of benefits

- Individuals eligible for more than one program administered by the VA are limited to 48 months of combined benefits

Benefits

- Tuition and Fees
- Monthly Housing Allowance
- Books and Supplies Stipend
- Rural Benefit
- Yellow Ribbon Program
- College Fund and Buy Up “Kickers”
- Licensing and Certification Test

Tuition and Fees

- Individuals on active duty are eligible for the lesser of:
  - Tuition and fees charged; or
  - The amount of charges that exceed the amount paid by the military's federal tuition assistance (Top Up)

- Individuals not on active duty are eligible for the applicable percentage (based on aggregate active duty service) for the lesser of;
  - Tuition and fees charged; or
  - Highest amount of tuition and fees charged for full-time, undergraduate training at a public institution of higher learning in the state the student is enrolled

Monthly Housing Allowance

- Equivalent to the Basic Allowance for Housing (BAH) for an E-5 with dependents
- Amount determined by zip code of the institution where the student is enrolled
  www.defensetravel.dod.mil/perdiem/bah/html
- Prorated based on individual's benefit level (40-100%)
- Payments issued directly to the student on a monthly basis

Monthly Housing Allowance

Individuals are not eligible for the monthly housing

allowance if they are:

- On active duty
- Training at ½ time or less
- Pursuing training solely by distance learning

Books and Supplies Stipend

Up to $1,000 per academic year for books and materials

- Payments issued directly to the student in a lump sum for each quarter, semester or term

- Active duty members are not eligible

Rural Benefit

- One-time payment of $500 for individuals who reside

  in a county with six persons or fewer per square mile

  - Physically relocates at least 500 miles, or
  - Travels by air to attend school and no other transportation exists

- Payment issued directly to the student in a lump sum

Yellow Ribbon Program

Institutions voluntarily enter into an agreement with the VA to fund tuition and fee expenses that exceed the highest public in-state undergraduate tuition and fees rates

- Only for individuals entitled to the 100% benefit rate
- Available on first-come first served basis
- Available to veterans and dependents

College Fund and Buy Up "Kickers"

MGIB-AD and MGIB-SR Kicker

- Individuals eligible for a kicker under another benefit may receive the kicker under the Post 9/11 GI Bill
- Monthly kicker amount will be prorated
- Payments issued monthly directly to the student

College Fund and Buy Up "Kickers"

- Post 9/11 GI Bill Kickers

  - Only payable if individual is entitled to a monthly housing allowance
  - Payment will be issued directly to the student with the monthly housing allowance

- $600 Buy-Up is not payable nor refundable under the Post 9/11 GI Bill

Licensing and Certification Test

- Eligible individuals may be reimbursed for **one** licensing or certification test
- Test must be approved for VA benefits
- Test must be taken on or after August 1, 2009
- Reimbursement may not exceed $2,000
- Housing allowance and book stipend not payable

Transfer of Entitlement

- An individual eligible for the Post 9/11 GI Bill based on his/her own active duty service may be allowed to transfer up to 36 months of entitlement to a dependent(s)

- The Department of Defense (DoD) may authorize transfer of benefits and restrict the number of months transferred

Transfer of Entitlement

- To be eligible to transfer entitlement an individual must:
  - Be in the Armed Forces on August 1, 2009
  - Have completed 6 years in the Armed Forces
  - Agree to serve 4 more years in the Armed Forces
- DoD may prescribe rules for individuals who, by military rules or retirement, cannot agree to serve 4 more years after August 1, 2009
- A transferor may revoke or modify the number of months of transferred benefits
- Benefits may not be transferred to a new dependent once the transferor is no longer a member of the Armed Forces

Transfer of Entitlement

Spouses may-

- Use benefits after transferor completes 6 years in the Armed Forces
- Continue to use benefits if divorced unless the transferor revokes transfer
- Use benefits up to transferor's 15-year eligibility period
  unless the transferor specifies an earlier ending date
- Receive benefits in the same manner and at the same rate as the transferor

Transfer of Entitlement

Children may-

- Establish eligibility if benefits are transferred before the age of 23
- Use benefits after transferor completes 10 years in Armed Forces if they:
  - Are at least 18 years old; or
  - Have completed requirements of secondary school
- Receive benefits at the rate of a veteran
- Use transferred benefits until 26th birthday

Transfer of Entitlement

Per Directive Type Memo (DTM), Transferability of Benefits website available Monday, 29June 2009, www.dmdc.osd.mil/TEB

- **No transferability applications will be approved until Service member agrees to an additional 4 years of service ~ with exceptions:**
  - **approved retirement date on or after August 1, 2009 and before July 1, 2010**
    - **NO additional service requirements**
  - **eligible for retirement after August 1, 2009 and before August 1, 2010**
    - **ONE additional year of service required**
  - **eligible for retirement on or after August 1, 2010 and before August 1, 2011**
    - **TWO additional years of service required**
  - **eligible for retirement on or after August 1, 2011 and before August 1, 2012**
    - **THREE additional years of service is required**

- **Service obligation starts when application for transferability submitted**

Next Steps

- VA began accepting Applications for VA Education Benefits on May 1, 2009
  - Veterans and Service members enrolling in Fall 2009
  - VA will announce when applications for Transfer of Entitlement (TOE) will be accepted
- Certificates of Eligibility
  - Benefit level based on length of service, including Yellow Ribbon for individuals at the maximum benefit level
  - 15-year eligibility date for individuals not on active duty
  - Number of months of entitlement
  - Program approval, if applicable

Next Steps

- VA plans to begin accepting Fall 2009 enrollment certifications beginning July 6, 2009
  - Advance payment will not be available
  - Enrollment processing will begin in July 2009, however, payments cannot be released before August 1, 2009

- Payments for the monthly housing allowance will be issued beginning September 1, 2009

PROGRAMS AT A GLANCE

MGIB – Chapter 30

- Active duty after June 30, 1985
- $1200 enrollment fee
- $1321 per month for 36 months
- May be used for various programs
  - Vocational/technical schools
  - Flight training
  - Undergrad/graduate programs
- May not transfer entitlement
- 10 year delimiting date

Post 9/11 GI Bill – Chapter 33

- Active service after September 10, 2001
- No enrollment fee
- Tuition and fees based on state and school attended
- Monthly housing stipend
- Book stipend up to $1,000/yr
- May only be used at Institutions of Higher Learning
- May transfer entitlement to family

For Latest Information

VA will update “Frequently Asked Questions” and install latest information about the Post-9/11 GI Bill at:

WWW.GIBILL.VA.GOV

Check this website first

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